

SIS 2000+ Training Manual

POS Designer

Purpose

This program is used to create *POS Configurations*, which are the *menus* of items available in food lines, and *Cash Drawers*, which are used to identify the source of payments and service for reporting and drawer reconciliation purposes. The Payments module and the Accounts module also use Cash Drawers. POS Configurations and Cash Drawers must be present before the Cafeteria module may be used.

A configuration is designated as being used for breakfast or lunch. A breakfast configuration has available only breakfast meals and ala Carte items, likewise a lunch configuration has available only lunch meals and ala Carte items. Transactions are then identified as Breakfast transactions, or Lunch transactions.

A POS Configuration may be used by more than one food line. If your cafeteria uses four food lines for lunch, and all food lines sell the same food items, then only one Lunch POS Configuration is needed.

A Cash Drawer should be present for each food line. A Cash Drawer should be used by only one workstation at a time

Prerequisites

Meal rates must be present in the Food Service Rates module

Food items must be present in the Food Services Items module

Training Objectives

Create a Cash Drawer

Designate a Cash Drawer as Locked or Unlocked. Understand the implications of a Locked Cash Drawer

Create a new POS Configuration

- Select School

- Complete Description

- Designate configuration as Breakfast or Lunch

- Name page tabs for food items. Understand how the pages are used in the Cafeteria module

Create a food item button

- Designate button as referencing a Meal item or an ala Carte item

- Select Meal or ala Carte item referenced by this button

- Modify or accept default text for button description

- Select button color

- Select button text color

- Modify or accept default button border

Move a button

Create an >ONLY< food item button. Understand how this button performs in the Cafeteria module.

Find an existing configuration

Delete an existing configuration. Understand the Delete process

Understand how item effective and expire dates affect food item availability, both in the POS Designer module and in the Cafeteria module.

Accessing the POS Designer

From the SchoolNet Main Menu, click on the Food Service button. From the Food Service menu, click on the **POS Designer** button (or Alt-S on the keyboard).

For further information refer to Help:

Available through the NeTel website at:
<http://www.netel.com/webdoc/default.htm>

Tasks

Create a Cash Drawer

From the **POS Designer** screen open the **File** menu and select **Cash Drawers** (Fig. 1).

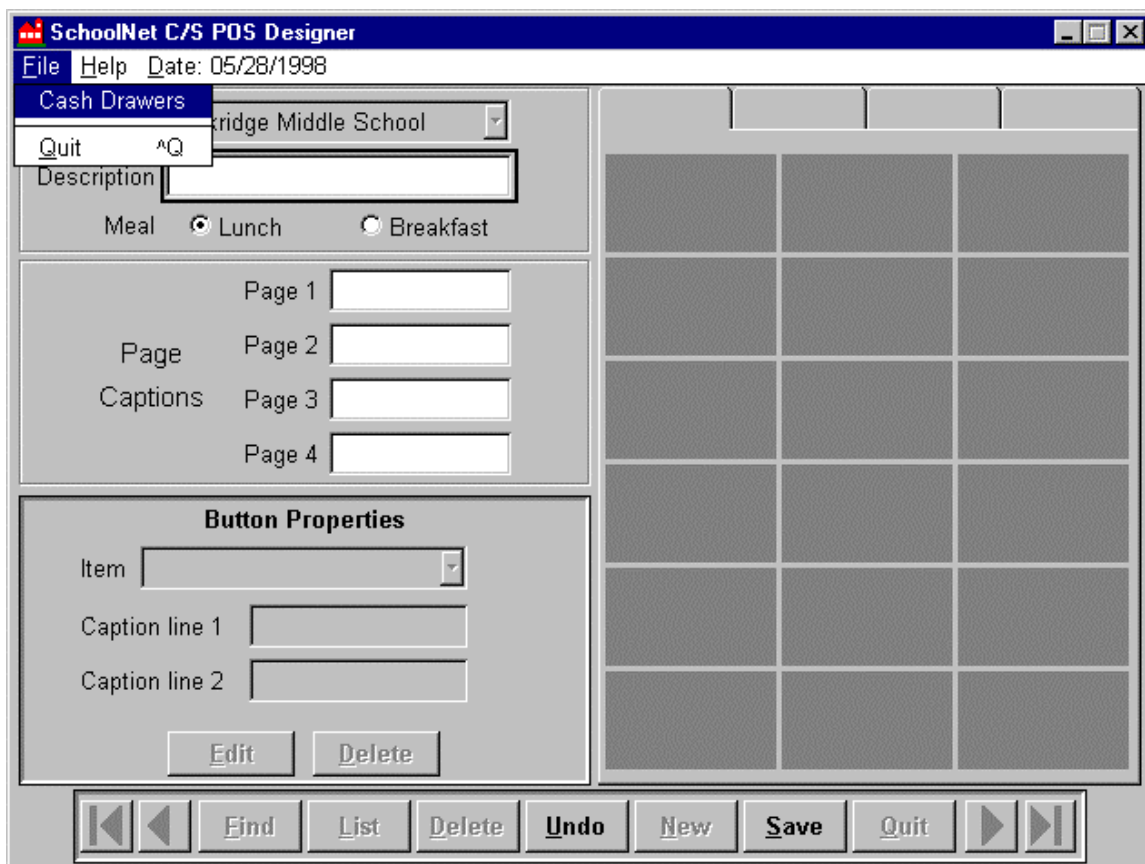


Fig. 1 – POS Designer File menu, Cash Drawers

Create a Cash Drawer (continued)

Create a Cash Drawer by completing the following selections:

School – Select School if available

The School selection is available *if* a district-wide database is in use and login was completed as System Administrator. Otherwise, **School** displays as read-only, local site

Edit – Click on the **Edit** button to place **Cash Drawers** into edit mode

Add – Click on the **Add** button to activate a new cash drawer record

Description – Complete Description. The Description is a user-defined text entry that appears on reports

Locked – Place a checkmark in the **Locked** box to designate this Cash Drawer as Locked and *not available for use by the Cafeteria module*. It is recommended that Office cash drawers be designated as Locked.

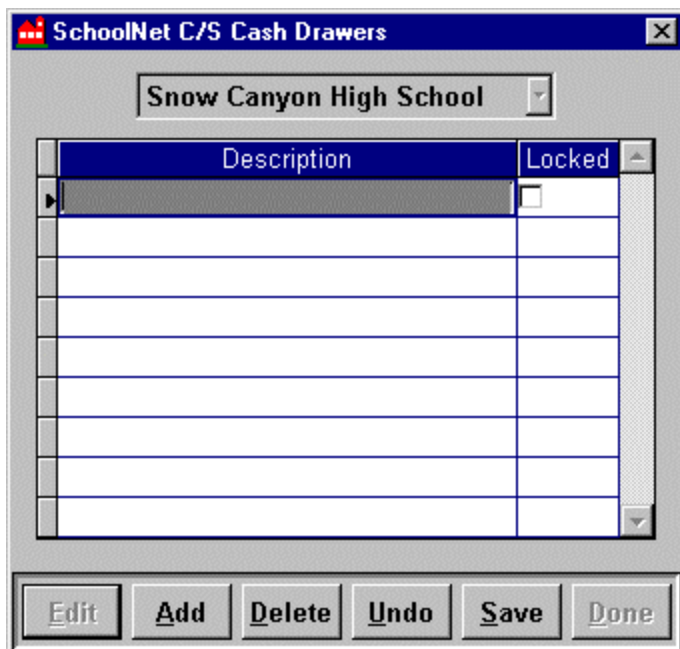


Fig. 2 – Cash Drawer Editor, Edit, Add mode, no drawers present

Delete – Select a Cash Drawer, then click on the **Delete** button to remove this drawer. A Cash Drawer may not be deleted if transactions are associated with it.

Undo – The **Undo** button removes unsaved changes to the Cash Drawer Editor and reverts back to the last saved version.

Save – Click on the **Save** button to record changes to the Cash Drawer Editor. **Save** places the Editor into read-only mode, where you may select **Edit** or **Done** (Fig. 3).

Done – Click on the **Done** button to exit the Cash Drawer Editor and return to the POS Designer

Create a Cash Drawer (continued)

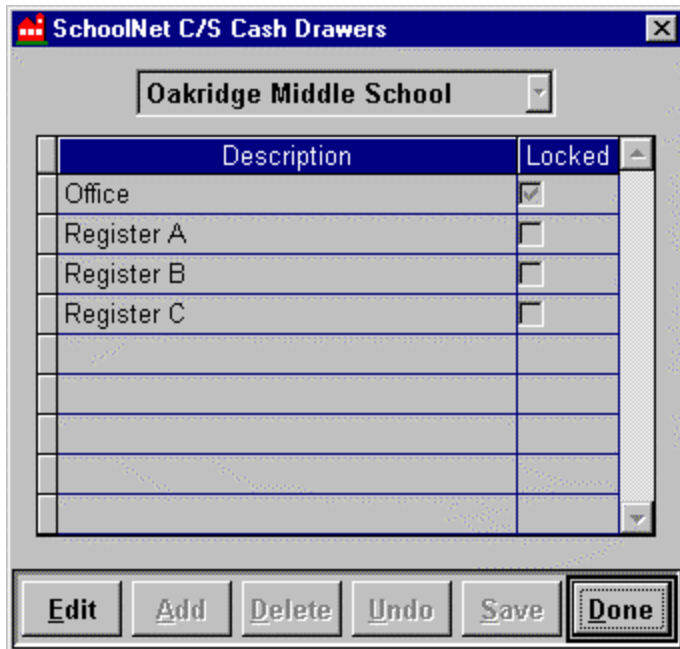


Fig. 3 – Cash Drawer Editor, drawer entries saved, read-only mode

Create a POS Configuration

Click on the **New** button (POS Configuration screen) to display the entry screen for a new configuration. Complete the following areas (Fig. 4):

School – Select School if available

The School selection is available *if* a district-wide database is in use and login was completed as System Administrator. Otherwise, **School** displays as read-only, local site

Description – Description of the POS Configuration is user-defined text. The configuration

Description is used during Cafeteria login when a configuration is selected for use. Choose a Description that will appear logical to the user.

Breakfast / Lunch –Select either the Breakfast or Lunch radio button to designate when this

Configuration will be used. A breakfast configuration has available only breakfast meals and ala Carte items, likewise a lunch configuration has available only lunch Meals and ala Carte Items. Transactions are then identified as Breakfast transactions, or Lunch transactions.

Page Captions – The **Page Caption** is user-defined text for the food item page tabs. This text appears on the food item page tabs when this configuration is used in the Cafeteria module. You may use up to 4 pages of food item buttons. Only complete captions for the pages you intend to use. Select and complete the first page caption, then use the Tab key to move to the next page caption. These entries may be changed at any time.

The POS Configuration is now ready to receive food item buttons. While the actual order of completion for a POS Configuration does not matter, it is recommended that the above areas be completed first.

Create a new POS Configuration (continued)

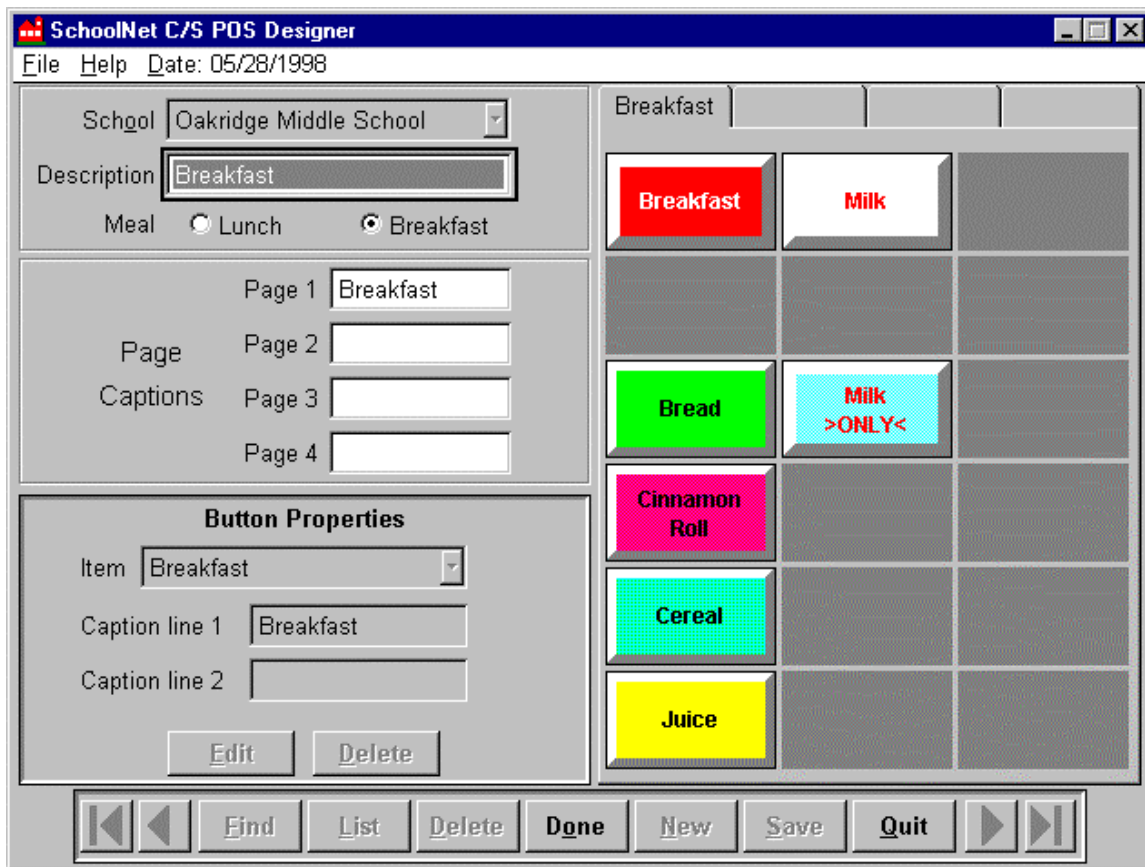


Fig. 4 – POS Configuration, Breakfast, one Page Caption

Create a food item button

With the POS Configuration in edit mode:

1. Click on the item grid where you wish to place the button
2. Click on 'Yes' from the confirmation prompt

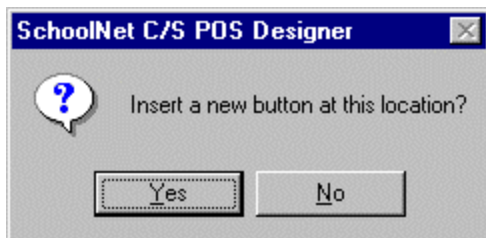


Fig. 5 – Insert button confirmation prompt

Create a food item button (continued)

3. Select whether this button represents a **Meal** item or an **ala Carte** item (first field). Click on the drop down list box (second field) to select the specific Meal item or ala Carte item.

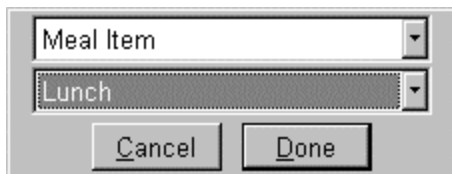


Fig. 6 – Identify Meal/ala Carte, and specific food item

4. Click on the **Done** button
5. Complete **Caption line 1 / Caption line 2** –
Accept or edit the default Caption text. The Caption text used does not affect which food item the button represents. The only text limitation is the physical width of the button.

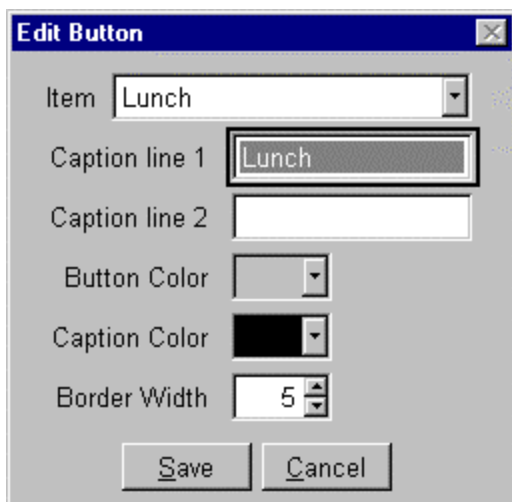


Fig. 7 – Accept or edit Caption text

6. Select **Button Color / Caption Color** (Fig. 7)
Click on the **Button Color** field to run SchoolNet Colors (Fig. 8). Click on a color to select it.
Click on **Save**
Click on the **Caption Color** field to run SchoolNet Colors (Fig. 8). Click on a color to select it.
Click on **Save**

Create a food item button (continued)

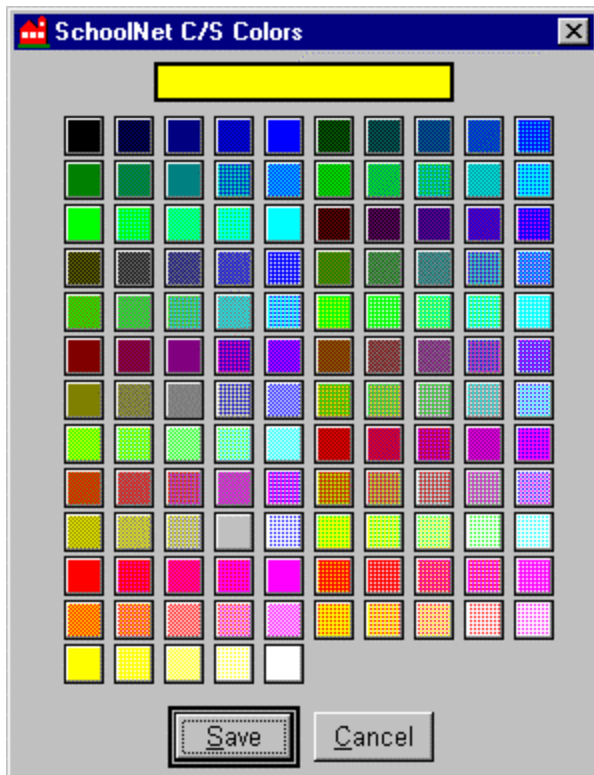


Fig. 8 – SchoolNet Colors

7. Modify or accept default **Button Border Width** –
Use the up/down arrows on the Border Width field to adjust the width setting. This determines how wide the white border is that surrounds the button. The greater the width, the more 3-dimensional the button appears (Fig. 9).

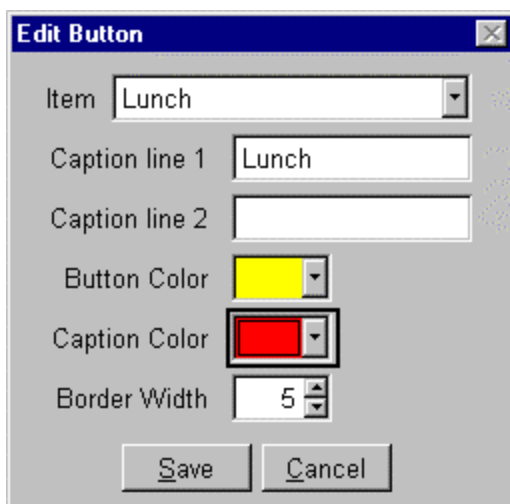


Fig. 9 – Button Border Width

8. Click on **Save** from the **Edit Button** screen when finished.

Move a button

1. Move the mouse until the pointer is on an inside corner of a button.
2. Hold down the left mouse button and drag the pointer to the new position in the button grid.
3. Release the mouse button. The food item button will not move until the mouse button is released in the new location. If the button does not move, the pointer has been placed too far within the button.

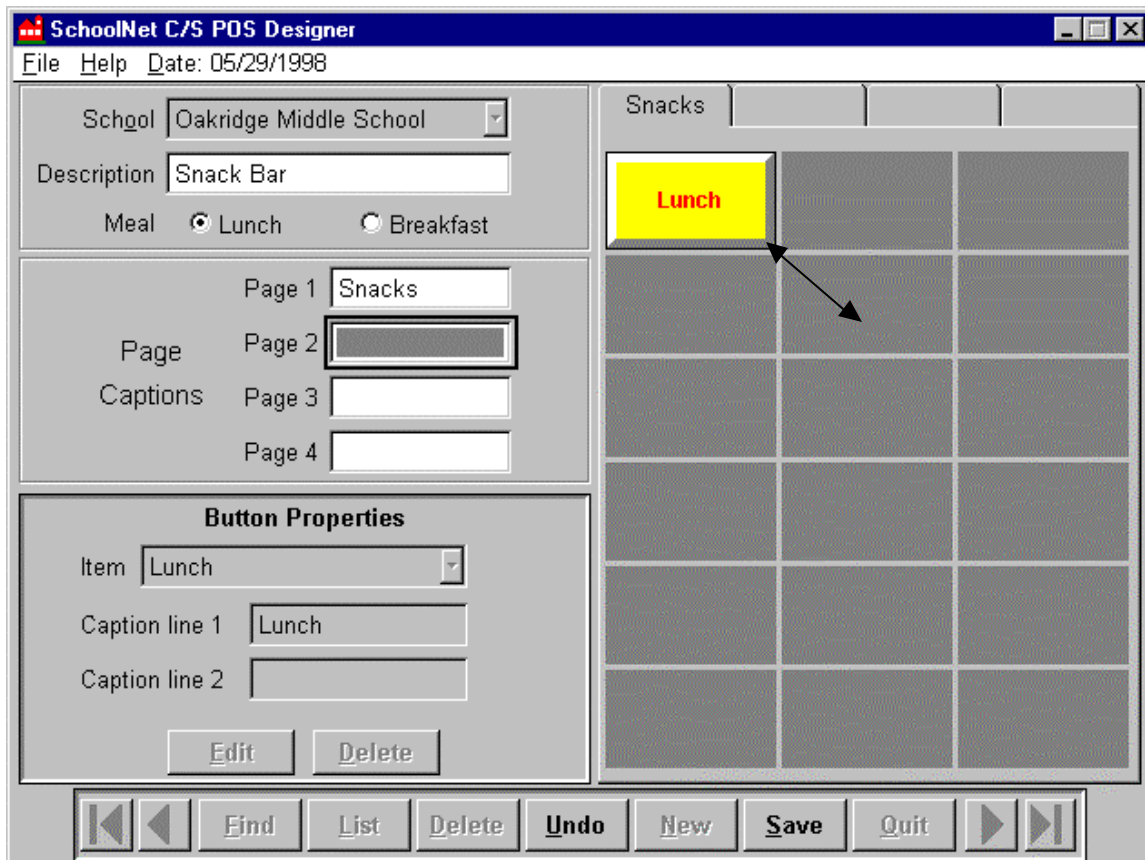


Fig. 10 – Move a food item button

Create an >ONLY< food item button

Understand how this button performs in the Cafeteria module.

1. Create a food item button
2. **Caption Line 2** –
Insert the following text into **Caption Line 2**

>ONLY<

Notice that the brackets are positioned so that each bracket points **TOWARDS** the text **ONLY** (Fig. 11).

3. How an >ONLY< button performs in the food line
When a button that contains this designation in Caption Line 2 is used in the food line, any food items present in a transaction are replaced by the food item represented by the >ONLY< button.

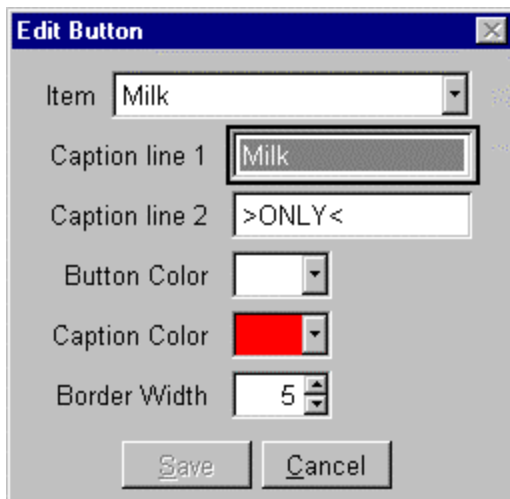


Fig. 11 - >ONLY< designation for a food item button

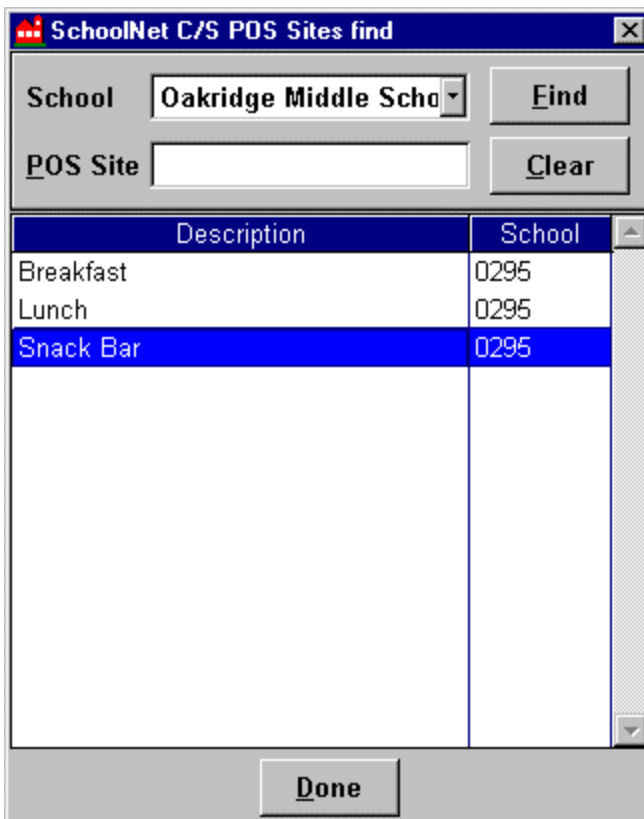
Find an existing configuration

1. Use the VCR buttons to scroll through POS Configurations until the desired configuration is displayed (Fig. 12). Or,



Fig. 12 – VCR buttons

2. Click on the **Find** or **List** buttons to run the **POS Sites find** utility (Fig. 13).
3. Select **School** (if School selection is available).
4. Enter **POS Site** description. This is optional, if the **Find** button is used without a site description, all sites for that school will display.
3. Click on the desired site, then click on the **Done** button.



Description	School
Breakfast	0295
Lunch	0295
Snack Bar	0295

Fig. 13 – Find a POS Configuration

Edit an existing POS Configuration

Locate the configuration and click on the **Edit** button to place into edit mode (Fig. 14). Since a configuration is just a menu of items available to food lines, a configuration may be edited at any time without consequence to historical data. Retype text, move, add, and delete buttons as needed. If you opt to delete a configuration, it simply means that from this point on this menu is no longer available.

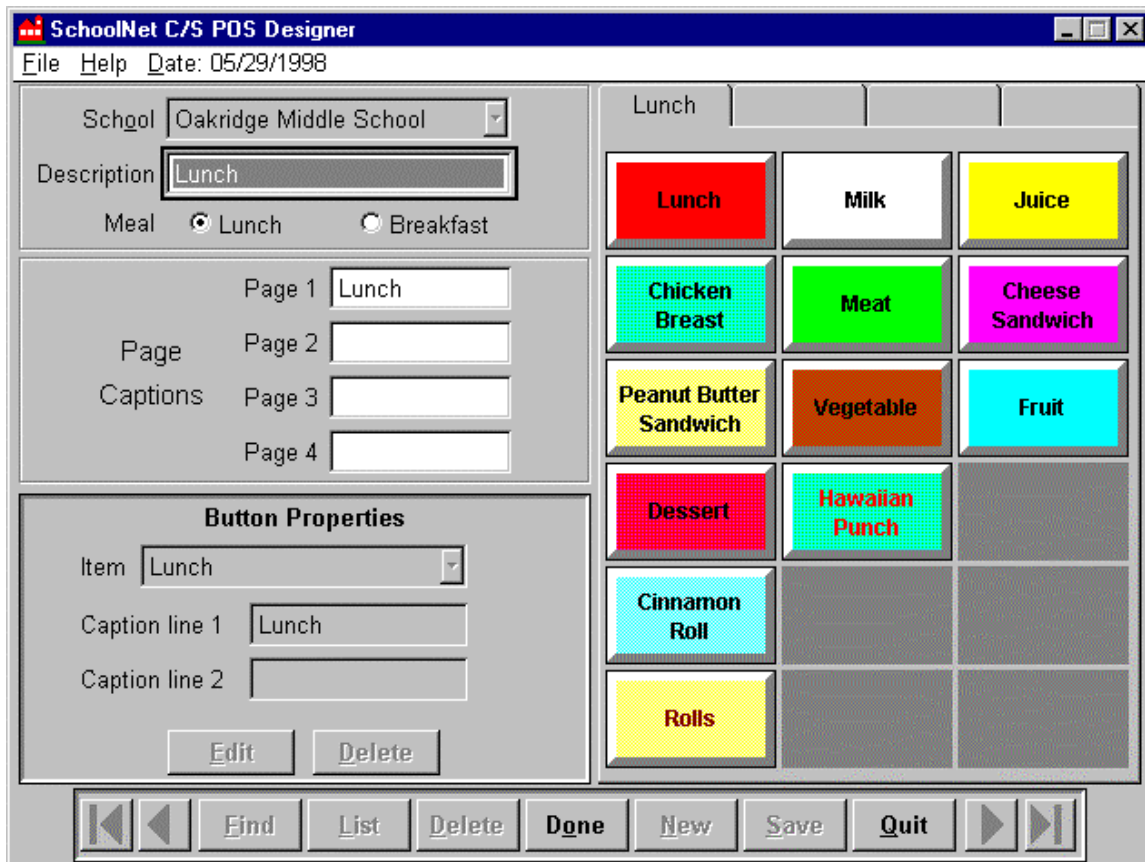


Fig. 14 – Edit a POS Configuration

Delete an existing POS Configuration

Locate and display the configuration you wish to delete. With the configuration in read-only mode, click on the **Delete** button. Select 'Yes' from the confirmation prompt. Remember, you are removing the entire POS Configuration. If you intend to remove only individual food item buttons, place this configuration into edit mode and follow the instructions for *Edit/Delete a Food Item Button*.

Delete an existing POS Configuration (continued)

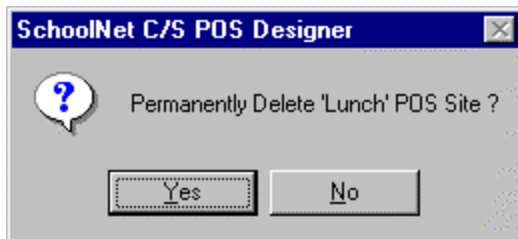


Fig. 13 – Delete POS Configuration

Edit / Delete a Food Item Button

1. Locate and display the configuration you wish to edit. Click on the **Edit** button to place into edit mode.

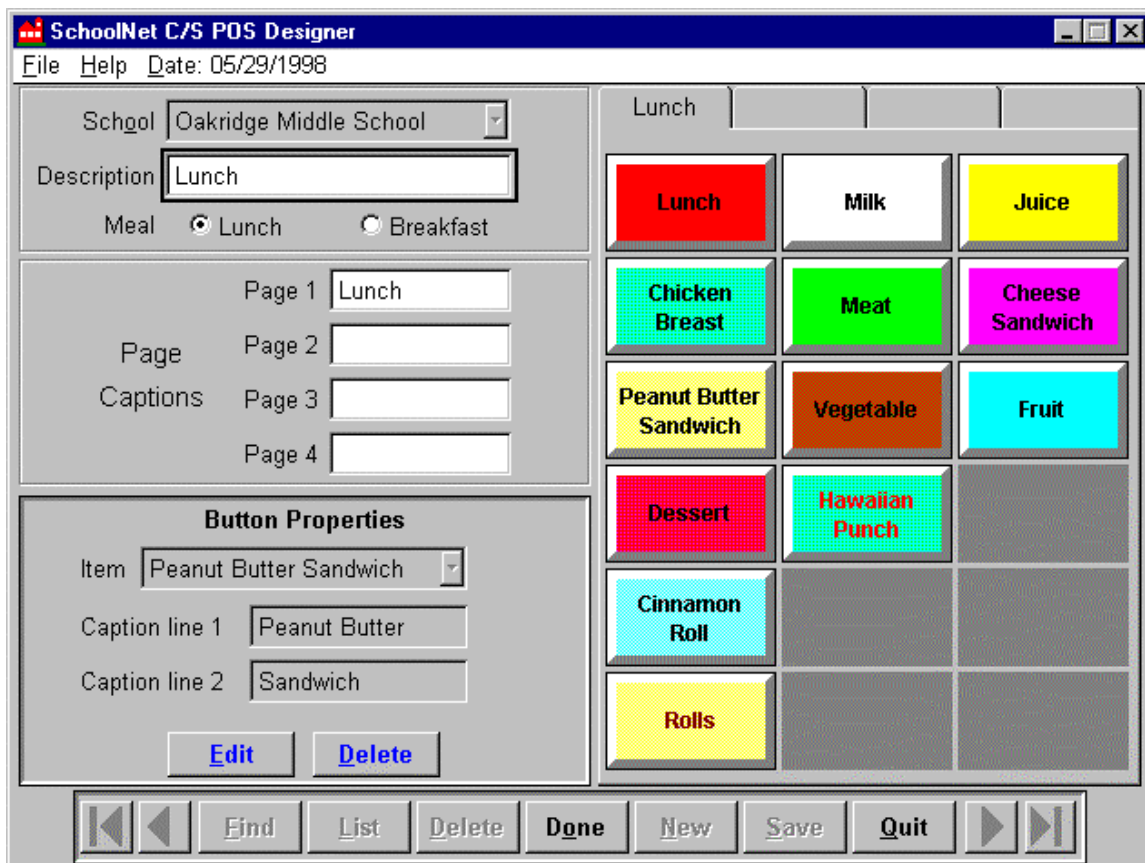


Fig. 14 -

2. Single-click on the food item button to activate the **Button Properties** portion of the POS Designer screen.
3. Click on the **Edit** button to run the **Edit Button** utility.
4. Click on the **Delete** button to remove this food item button. Select 'Yes' from the Delete confirmation prompt (Fig. 15). Remember, only the button is being removed, *not* the food item it represents.

Edit / Delete a Food Item Button (continued)

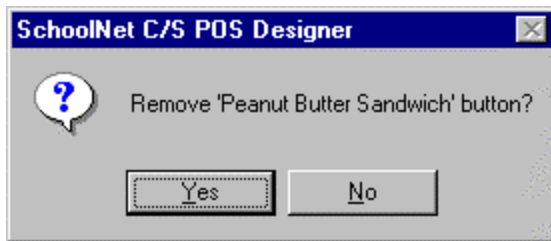


Fig. 15 – Confirmation prompt, Delete food item button

Understand how Item effective and expire dates affect food item availability

POS Designer module and Cafeteria module.

Food Items use optional *effective and expire* dates to determine when an item is available. If these dates are not used, then the item is assumed to be available at all times. This section discusses the consequences of attempting to reference a food item on a date that is outside the effective date range.

In the POS Designer

When a button is being created and the food item it references is being selected, only the Meal and ala Carte items that are available *on this date* (per the Item effective and expire dates) are present in the drop down list box.

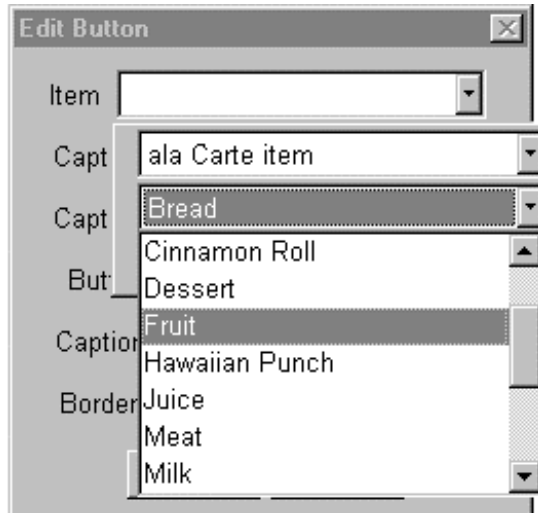


Fig. 16 – Item availability

In the Cafeteria module

When an existing food item button references a food item that uses effective and expire dates, and the Cafeteria module is launched on a date that is outside the effective date range of this item, the item button is still present in the Cafeteria display but is disabled (grayed out), because the food item is not available on this date.